PANEL COORDINATOR Orientation

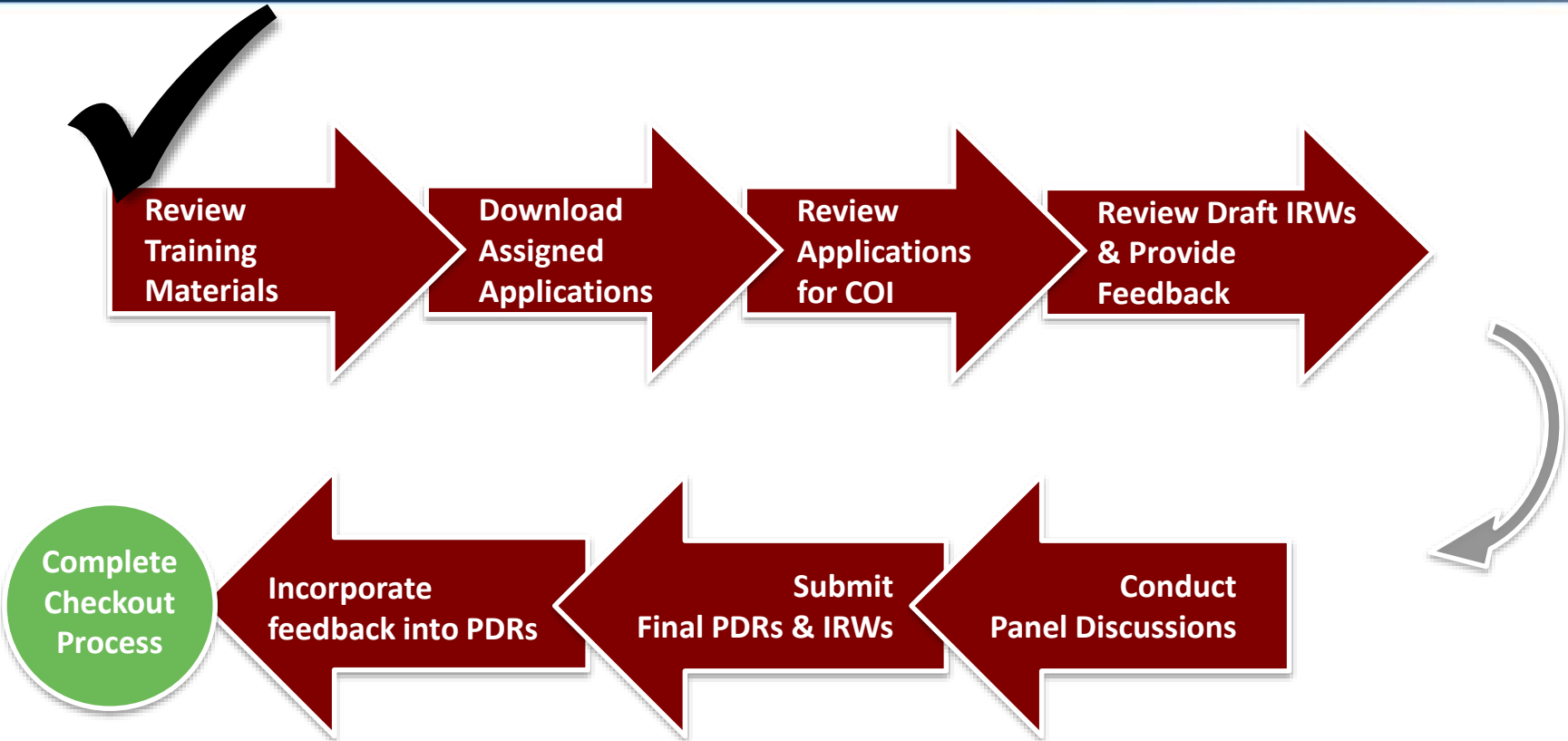## 2015 Social Innovation Fund

Expert Review

Monday, March 30, 2015
1:00 pm

Corporation for
NATIONAL & COMMUNITY SERVICE ★★★ | SOCIAL INNOVATION FUND
Finding what works. Making it work for more people.

AGENDA

- **The CNCS External Review Process**

- **Conflict of Interest & Confidentiality**

- **Individual Reviewer Worksheet Standards**
  – Clarify expectations for reviewing IRWs and managing panel activities

- **Panel Discussions**

- **The Panel Discussion Report**
  – Understand the expectations of the Panel Discussion

- **eGrants Use in the Review**
  – Only accessing applications

- *Question & Answer*

AmeriCorps | Senior Corps | Social Innovation Fund | Volunteer Generation Fund

Corporation for NATIONAL & COMMUNITY SERVICE | SOCIAL INNOVATION FUND
Finding what works. Making it work for more people.

EXTERNAL REVIEW PROCESS

Review Training Materials → Download Assigned Applications → Review Applications for COI → Review Draft IRWs & Provide Feedback

Conduct Panel Discussions → Submit Final PDRs & IRWs → Incorporate feedback into PDRs → Complete Checkout Process

Panel Coordinator Workflow

Corporation for NATIONAL & COMMUNITY SERVICE | SOCIAL INNOVATION FUND — Finding what works. Making it work for more people.

CONFLICT OF INTEREST

- Applications will be available on Thursday, April 2, 2015
  - All Panelists are asked to review for potential COIs

- Notify CNCS of any COI concerns
  - Reviewers are asked to involve their Panel Coordinator in notifications

- Return signed forms to CNCS by noon April 6, 2015
  - Submission information on each form

- Keep panel moving, be flexible

AmeriCorps | Senior Corps | Social Innovation Fund | Volunteer Generation Fund

Corporation for NATIONAL & COMMUNITY SERVICE ★★★ | SOCIAL INNOVATION FUND
Finding what works. Making it work for more people.

Keeping the Panel on Track

- Consult tips in Panel Coordinator Supplement of the Reviewer Handbook

- Communicate proactively with Reviewers, create agreements
  - Working weekends, breaks during Panel Discussions, etc.

- Provide advanced warning of concerns to GARP Liaison

- Do not stray from established schedule
  - Conflicts of Interest
  - Dropped Reviewer
  - Non-responsiveness

- Provide general and specific suggestions via email
  - Provide guidance on the level of quality of comments
  - You are not expected to directly edit the comments or Ratings
  - Review Participants should apply general feedback to subsequent IRWs

AmeriCorps | Senior Corps | Social Innovation Fund | Volunteer Generation Fund

Corporation for NATIONAL & COMMUNITY SERVICE | SOCIAL INNOVATION FUND
Finding what works. Making it work for more people.

Check-Ins and Updates

- Panel Coordinator Check-Ins
  - Phone number 888-455-7455
  - Passcode 3743711
  - Three, 30 minute check-ins (all recorded)
    - Monday, April 6, 1:00 pm
    - Thursday, April 9, 1:00 pm
    - Tuesday April 14, 1:00 pm
  - Opportunity to share tips with other PCs
  - Updates on panel progress are requested
  - Guidance and new information is given
    - Important to communicate the information to Reviewers
- GARP and Program Officer Liaisons
  - Will check in periodically
  - Be Proactive, about possibly missing deadlines

AmeriCorps | Senior Corps | Social Innovation Fund | Volunteer Generation Fund

CORPORATION FOR NATIONAL & COMMUNITY SERVICE | SOCIAL INNOVATION FUND

Finding what works. Making it work for more people.

Interacting with GARP Liaison

- Your GARP Liaison is your primary liaison

  – Most will check email over the weekends

- Sending Correspondence to your GARP Liaison

  – All correspondence should be sent directly to your GL

  – Always Include Panel # in Subject Line

Interacting with GARP Liaison cont.

- Anticipated Interactions

  – Check-in before Panel Introduction Call

  – Any needs that your panel may have

  – Advice on possible COIs

  – Help with any Reviewer issues

  – Your GL will review all Panel Discussion Notes and provide feedback if needed

    - Providing feedback on PDRs (content of Report, or content from Discussion) and looking for documentation of wide variations in ratings

  – Checkout Package verification

AmeriCorps | Senior Corps | Social Innovation Fund | Volunteer Generation Fund

Corporation for NATIONAL & COMMUNITY SERVICE ★★★ | SOCIAL INNOVATION FUND
Finding what works. Making it work for more people.

Interacting with Program Officer Liaison

- Your POL is there to support you with questions about review criteria or interpreting selection criteria.
  - Available Monday - Friday

- Sending Correspondence to your POL

  - Program and Evaluation Reviews:

    - All panel correspondence should be sent from you to SIFApplication@cns.gov

    - Always Include Panel # in Subject Line

    - Always CC: GARP Liaison

AmeriCorps | Senior Corps | Social Innovation Fund | Volunteer Generation Fund

Interacting with Program Officer Liaison cont.

Anticipated Interactions

- Check-in with your POL before your first Panel Discussion Call

- You can request clarification of Selection Criteria (on behalf of your panel, by email, or requesting your POL to join the panel call for 5 minutes)

- Your POL will Review all IRWs for Selection Criteria interpretation

  – Providing feedback on IRWs is focused on the relevance of comments to the selection criteria and on the alignment of comments with the selected ratings

AmeriCorps | Senior Corps | Social Innovation Fund | Volunteer Generation Fund

Interacting with Your Editor

- An outside Editor will review all of your IRWs

  – This person will review for writing quality, clarity of the comments, and overall grammatical correctness.

- You will send your IRWs to the Editor after the POL has reviewed them. The Editor will not be reviewing for review requirements, rather just providing feedback on the comments themselves.

- The Editor will only review IRWs once and any feedback should be incorporated by the Reviewers.

AmeriCorps | Senior Corps | Social Innovation Fund | Volunteer Generation Fund

Corporation for NATIONAL & COMMUNITY SERVICE | SOCIAL INNOVATION FUND
Finding what works. Making it work for more people.

IRW Development Process

Complete the IRW Draft

↓

Submit to Panel Coordinator

↓

PC Reviews Comments, Provides Feedback

↓

Panel Discussion

↓

Amend IRW, Complete Applicant Feedback

AmeriCorps | Senior Corps | Social Innovation Fund | Volunteer Generation Fund

NATIONAL & COMMUNITY SERVICE | SOCIAL INNOVATION FUND
Finding what works. Making it work for more people.

IRW Development Process cont.

Submit to Program Officer Liaison

POL Reviews Comments, Provides Feedback

Submit to Editor

Editor Provides Feedback

Amend IRW and PDR

Finalize IRW

AmeriCorps | Senior Corps | Social Innovation Fund | Volunteer Generation Fund

Corporation for NATIONAL & COMMUNITY SERVICE ★★★ | SOCIAL INNOVATION FUND
Finding what works. Making it work for more people.

Review Draft IRWs

- Reviewers will write their draft IRWs (in Word) for each application being discussed

- Reviewers will email their draft IRWs to you prior to panel discussions and you should review them and send suggestions via email

  – Reviewers should apply general feedback to subsequent IRWs

- After the Panel Discussion, Reviewers have a final draft, that you should send as a group to the POL and Editor for review and feedback

  — Reviewers should apply general feedback to subsequent IRWs

- If a Reviewer is not meeting deadlines or is not responsive, notify GARP Liaison

Help Reviewers Understand Acceptable IRW Standards

Reference Writing Meaningful Comment

- Application information is limited to the reviewed application and no others (no comparisons with other applications, etc.)

- Language is evaluative and appropriate with no suggestions for a "better proposal"

- Sentences are complete; grammar and spelling are correct

- Applicant Feedback section contains balanced appropriate feedback

- Comments are required and should be appropriate
  - Ensure the comments are aligned with the ratings

Panel Discussions

- Set expectations in the Panel Introduction Call and confirm them at the beginning of each Panel Discussion

- Plan for a maximum of 45minutes per application

- Walk through each Criterion, not only Criteria where Reviewers were in disagreement

- Reference Individual Review Rubric and IRW Samples

- In cases of uncertainty, or where clarification is needed, you are encouraged to table and revisit the application

- Encourage all Review Participants to share their assessments and to ask questions (roundtable format)

- Remind Reviewers of next steps (revisit and amend IRWs)

Panel Discussion Report (PDR)

- Take preliminary notes during the Panel Discussion

- Summarize what issues were discussed and the resolution to any disagreements
  - You are not expected to provide detailed transcript narrative
  - Do not include personal opinion in the summary of the discussion
  - Do not include Reviewer's names in PDRs (use "Reviewer 1", "Reviewer 2" etc. instead)

- Provide your observations

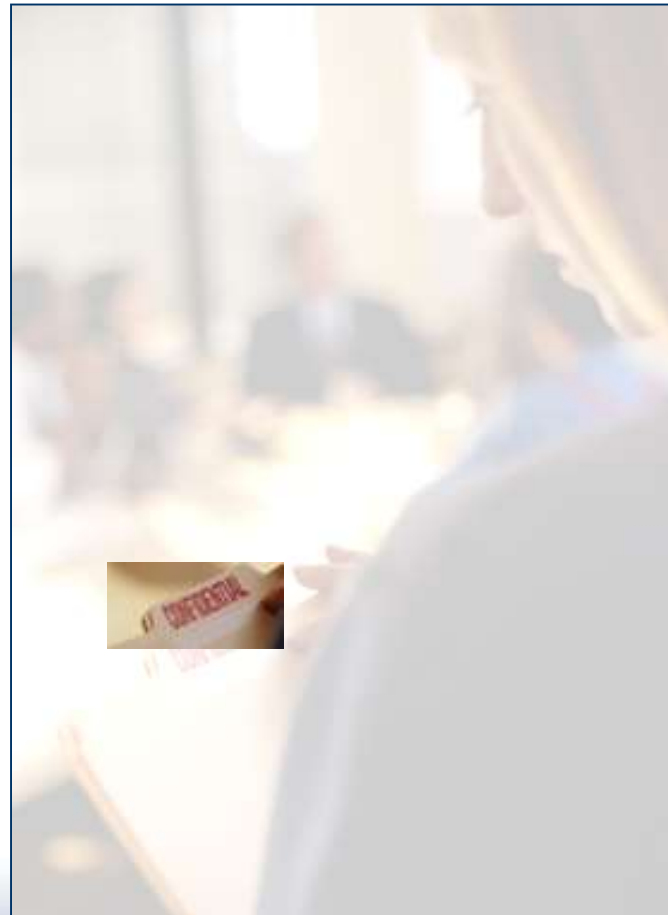- Send your completed PDRs to your GARP Liaison
  - Apply feedback from your GL

Getting POL and Editor Feedback on IRWs

Sending POL all of your panel's IRWs

- The expectation for SIF is that POLs will review all of the Reviewer's Individual Worksheets for adherence to review requirements

- Please send POLs the final draft after the Reviewer has made adjustments from the Panel Discussion

- POL is providing feedback on the relevance of comments to the selection criteria and on the alignment of comments with the selected rating

- Editors providing feedback on the clarity of comment and how well they are written

- You should authorize Reviewers to send their final IRWs to you.

CONFIDENTIALITY

- Applicant Confidentiality

  – Applicant names and business information

  – Application details and proposed projects

  – Review comments and scores

- Participant Confidentiality

  – Review documents and the names of Review Participants will be made public

  – Your name will not stay with your comments or scores

Corporation for NATIONAL & COMMUNITY SERVICE | SOCIAL INNOVATION FUND
Finding what works. Making it work for more people.

CHECKOUT PROCESS

- Finalize all PDRs and ensure all Reviewers have finalized their IRWs

- Send your IRWs and PDRs as you complete them to your GL. You should do this ongoing through the review so by the end the GL has all of the final IRWs and PDRs . You do not need to send a Checkout Package.

- Once you have reviewed them, ensure all Reviewers have finalized their IRWs

- Check-in with your GARP Liaison

- Complete Evaluation
  - Evaluate Review Process, and panelists
  - URL will be provided via email on the last day of the Review– April 16, 2015

CORPORATION FOR NATIONAL & COMMUNITY SERVICE | SOCIAL INNOVATION FUND

Finding what works. Making it work for more people.

QUESTIONS?

AmeriCorps | Senior Corps | Social Innovation Fund | Volunteer Generation Fund

Corporation for
NATIONAL&
COMMUNITY
SERVICE
SOCIAL
INNOVATION
FUND
Finding what works. Making it work for more people.

RESOURCES

- **Review Process Questions**

  - GARP Liaison

- **Social Innovation Fund Program Questions**

  - Your Program Officer Liaison (Program and Evaluation Reviews SIFApplicant@cns.gov)

  - GARP Liaison

- **eGrants Issues – National Service Hotline** (Mon- Thursday, 9a - 7p EST)

  - 1-800-942-2677

  - **Online:** http://www.nationalservice.gov/questions/app/ask

- Final Orientation: ***Entering IRW information & Launching the Review*** will be a live call on **Wednesday, April 1 at 1:00 pm ET.**

  - **Both Program and Evaluation Reviewers at 1:00 pm**

AmeriCorps | Senior Corps | Social Innovation Fund | Volunteer Generation Fund

NATIONAL & COMMUNITY SERVICE | SOCIAL INNOVATION FUND
Finding what works. Making it work for more people.